Global Animation Industry 2015: Strategies, Trends and Opportunities

Description: The rapid advancement of technology has made computer animation available to the masses and the animation industry is one of the fastest growing industries. The demand for animated entertainment has expanded with the increase in broadcasting hours by cable and satellite TV along with the growing popularity of the Internet. In the past, animation series were aimed at children aged nine and below. In recent years however, TV stations have been producing animation series for teenagers, adults and the whole family. Animation series like The Simpsons and King of the Hill have been successfully aired on primetime TV. The major markets include the United States, Canada, Japan, France, Britain and Germany. Licensing operations for T-shirts, caps and other items have also been a major source of revenue for animation companies. In Japan, several successful computer games have crossed over and have become animated series like Pokemon, Monster Farm, Power Stone and Detective Conan. More broadly speaking, animation is increasingly used in video games, and movies are also increasingly reliant on animation and computer graphic special effects.

Another key trend we are witnessing is the outsourcing of animation content to Asia. This market is increasingly being tapped by North American film and television program producers. The major factor behind this shift of computer animation production to the Asia/Pacific region continues to be the availability of low cost, powerful computer animation platforms and much lower labour rates in the Asian and Pacific Rim countries compared to North America and Europe. The bulk of the outsourcing happens for 2D animation content with some amount of 3D content.

ECONOMICS OF ANIMATION COPYRIGHTS

Animators face a long and daunting obstacle race to bring their works to market. First they must find a producer prepared to speculatively develop and package the work to an offerable stage. This typically involves the creation of a 'pilot' episode or sequence, plus extensive artwork, scripts and the gathering of commitments from key production facilities and personnel. Next the producer must secure an international consortium of broadcasters, distributors and sales agents prepared to commit to the production - international because no single, local market outside the US offers prices sufficient to underwrite a major animated work. The buying consortium in turn must be supported by a panel of investors or lenders prepared to cashflow production against the consortium's 'presale' and distribution commitments, which are normally contingent on delivery of the finished work. Even at this stage, there is typically a shortfall or 'gap' between the production cost and the presale commitments, which must be met by a third-party investor or else absorbed by the production team in the form of wage deferrals or the foregoing of profits. Only then, often after many years of effort, can the work attempt the final hurdle, of consumer acceptance.

From an economic perspective, the creation of copyright works is a tenuous enterprise, characterised by high levels of risk and low average rates of return. This is not merely a local perspective: it is the same for copyright creators the world over. Even the Hollywood studios earn only a break-even return on their copyright investments, and rely on the 'upstream' profits of distribution for their corporate viability.

DYNAMICS OF COPYRIGHTS

How can such low average profitability be reconciled with the tremendous popularity of movies, animations and other copyright-based entertainments? To answer this question requires an assessment of the dynamics of copyright markets, noting in particular:

- The long chain of intermediaries linking creation with consumption, each deducting their costs and profits before the remainder is passed on. The copyright market resembles a pyramid where the revenues flow from the top to the various entities below.
- The zero-pricing of entertainment products in the main, free-to-air television markets, which are fully funded by third-party advertisers, so that consumers pay only by their attention to the advertising messages. Customers do a trade-off, whereby consumers accept their preferences in return for free entertainment. Web-based subscriptions systems may overcome this approach in the future.
- The market power of ruling intermediaries who are the broadcasters and distributors who dominate the world market for content. Globally, there are about five or six corporations which between them command 70-80 per cent of the main media markets; locally, their power is further concentrated so that a
matrix of international media power would show a cross-linked and vertically-integrated network of interests.

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